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ABSTRACT

A study investigated the kinds of content total market coverage (TMC) publications carry, the role of the newsroom in publishing them, and how closely identified they are with the parent newspaper. These TMC publications, begun only a few years ago, are designed to cover the total market with selected, preprinted advertisements inserted into newspapers. Some, however, contain editorial content, which raises questions about the integrity of that content, since the independence of news and advertising is a foundation of modern-day journalism. A questionnaire on these issues was submitted to 337 newspapers stratified by circulation to insure representation of newspapers of all sizes. Results indicated that 77% of American newspapers have a TMC publication, 8% have tried one but discontinued it, while another 8% have never tried a TMC. The TMC products carried a newshole (percentage of space devoted to news) of 28.39%, considerably lower than the 48.12% newshole estimated for the regular newspaper. Editorial content of the TMC products ranged from wire service news to recipes--with recycled local news by far the largest category, followed by syndicated material, wire service news, new local material, freelance material, and "other" material. Overwhelmingly, the TMC publications were closely associated with the parent newspaper--a total of 93% said that their TMC products were readily identifiable in the community as publications of the newspaper. Editorial content decisions were usually left up to the newsroom, but were sometimes made by the advertising department, by management, or even by the composing room. (Seven tables of data, as well as the survey questionnaire, are appended.) (NKA)

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EDITORIAL SELECTION IN NEWSPAPER TMC PUBLICATIONS

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A paper presented to the Newspaper Division
of the Association for Education in Journalism
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EDITORIAL SELECTION IN NEWSPAPER TMC PUBLICATIONS

ABSTRACT

In recent years, most newspapers have developed total-market-coverage (TMC) publications as a means to meet advertisers' needs for wider distribution of preprinted advertising inserts. But TMC publications also carry editorial matter, and the treatment of that content has implications for the integrity of the regular paper. This study explored how closely the TMC publication was identified with the regular paper, who selected the content and on what basis.

EDITORIAL SELECTION IN NEWSPAPER TMC PUBLICATIONS

INTRODUCTION

In the past few years, significant changes have occurred in newspaper advertising and circulation. Almost all American newspapers now print and distribute publications aimed at covering the total market with selected advertisements. Most of these total-market-coverage (TMC) publications carry editorial matter as well. Since TMC publications are intended as advertising vehicles, their use and treatment of editorial content has implications for the parent newspaper. This study was designed to investigate the kinds of content the TMC publications carry, the role of the newsroom in publishing them, and how closely identified they are with the parent newspaper.

BACKGROUND

TMC publications were begun only a few years ago, primarily as a way to deliver preprinted advertising. Since 1970, preprinted advertising inserts have gained increasing importance as newspaper revenue producers. As Table 1 shows, newspaper-delivered inserts came from nowhere to account for $4 billion of the industry's advertising revenue in 1985, and ad revenues from inserts have been growing faster than total newspaper revenue each year.

Inserts grew as a byproduct of a shift from small, independent businesses to retail chains. Retail stores that once were the mainstay of newspaper advertising -- and which depended on the newspaper as the only game in town -- were swallowed whole. But the chains, with regional management and more media choices, saw newspapers as only one tool in their marketing repertoires. For one thing, they could achieve greater control by printing their own advertising -- K mart is now one of the country's largest users of paper and printing materials.[1]

As retail chains grew, changes were occurring not only in newspaper advertising, but also in circulation. Daily newspaper circulation increased only 1 percent from 1970 to 1985, while population went up 29.5 million (Table 2).

In addition, since inserts could be delivered by a third party, newspapers felt competition from aggressive direct mail firms. For example, newspapers' shares of K mart's preprint business dropped from 89 percent to 62 percent in the early 1980s.[2]

With inserts a new force in their advertising growth and yet with aggressive competitors fighting for their preprint-delivery business, newspapers found themselves in a vulnerable position. Their most widespread response was to develop total-market-coverage (TMC). In TMC, a newspaper prints a separate publication and delivers it free, usually by mail, to non-subscribers. Inside the TMC publication is preprinted advertising that also is delivered to subscribers as inserts in the regular paper. Most TMC products also carry new or recycled classified advertising and, in urban areas, zoned retail advertisements.

TMC products, usually delivered once a week, sometimes are mere wrappers for the inserts; other times they are almost identical to a section of the regular paper. But combined with regular newspaper delivery, TMC publications enable a newspaper to obtain something it cannot have by itself: 100 percent coverage of the market for an advertiser. Nearly all newspapers have established or experimented with TMC products.[3]

Total market coverage publications differ from their newspaper parents in several important ways. First, they are aimed at non-subscribers -- non-readers, perhaps, but almost certainly infrequent ones. About two-thirds of the TMC products are delivered, not by a newspaper carrier, but by the U.S. Postal Service. And, being free, they carry the connotation of "junk mail." Most important, however, is that TMC products are designed to distribute advertising, where the main mission of newspapers is to disseminate information, albeit partly in the advertising that also pays the bills.

Editorial content is given scant attention in discussions of TMC publications, although the U.S. Postal Service mandates the presence of non-advertising matter in any TMC publication mailed under second-class rates, which many newspapers use because of lower costs. Regardless of delivery mode, however, most of the basic TMC products classified in a 1983 survey were "publications" of some type, presumably with editorial content;[4] the rest appeared to be strictly advertising carriers.

The idea of editorial content in a publication marketed primarily as an advertising vehicle raises questions about the integrity of that content, since the independence of news and advertising is a foundation of modern-day journalism. Newspapers sometimes carry material, such as special advertising sections, that are unlike the normal newspaper product, but even these differ in character and intent from the TMC publication. Special sections, except in rare cases, carry content selected and processed by editors for regular readers who pay for the paper.

As TMC publications grow, the question of how the public might perceive their content becomes more important. Is a newspaper's TMC publication trading off the paper's editorial

reputation, yet delivering something quite different? Such questions go to the heart of American journalism, where by law, theory and practice, the selection of content has been in the hands of editors and that prerogative jealously guarded.

For TMC publications, the important questions about content are: Who decides what kind of content will be carried? What is the source of the content? Who selects it and who processes it? And on what basis are these decisions made?

One would expect the answers to these questions to differ according to how closely the TMC publication is identified with the paper. Newspapers that use a regular newspaper section as a TMC vehicle, or that employ the paper's format, typefaces and design, would seemingly try to guard the editorial integrity of the content -- by turning content planning, selecting and processing over to the newsroom. On the other hand, newspapers that treat TMC products as completely separate would turn them over to a department other than the newsroom. In this case, they would be a marketing, not a journalistic, device.

In addition, one would expect different treatment of TMC material depending on a newspaper's size. Newspapers in smaller communities should perceive their readership differently than papers in large urban areas. Thus, it was anticipated that smaller-circulation newspapers would be more closely identified with their TMC products than would larger-circulation papers. It also seemed likely that they would have to rely on their newsrooms to process the material, whereas the larger newspapers would have resources to give TMC editorial matter independent treatment.

METHODOLOGY

A questionnaire was drawn up (Appendix A) for a survey of U.S. newspapers. It consisted of three kinds of questions. First were questions about each newspaper's experience with TMC products. For the most part,[5] these were follow-ups to previous surveys about TMC use. The questions covered items such as day of delivery, method of delivery, advertising content, format, page size and so on.

The second kind of question was geared to the identification of the TMC product with the regular newspaper. Several items were asked:

1. The name of the TMC product. The thought was that TMC products closely identified with their parent publications would carry part of the parent title in their name.

2. Whether the same body type and headline faces were used

in the TMC publication as in the parent newspaper. The idea here was that TMC products closely identified with the newspaper would try to look the same, and that body and headline type would be indications of this.

3. Whether the TMC product was promoted as a publication of the newspaper or as a separate publication. It was reasoned that how the newspaper presented its TMC publication to the public would be a chief indicator of audience perception of it as part of the newspaper.

4. Whether the TMC product was readily identifiable in the community as a publication of the newspaper. This was the direct approach to the question of TMC identity. The answer also would give a newspaper's own philosophy toward its TMC product. This question was a key to the identification question. Only if answers were unclear would the items on type and name be needed.

The third area of questions concerned editorial content. Respondents were asked:

1. The amount of newshole in the TMC and in the regular newspaper. Newspapers were asked to estimate the percentage of space devoted to news in both publications.

2. Who decides the kind of editorial content in the TMC product. Choices were the advertising department, the editorial department or some other unit.

3. The kind of editorial content. Respondents were asked to estimate the percentage of content from various sources: local newspaper material already run, new materials produced locally, wire services, syndicates, free-lancers or "other."

4. How TMC editorial philosophy is determined. Since these publications are aimed at non-subscribers, it was deemed important to find out how content was chosen.

Respondents were asked to rate, on a scale of 1 to 5, the importance of several factors in the determination of TMC editorial philosophy: surveys of subscribers, surveys of non-subscribers, comments from subscribers, publisher's judgment, newsroom's judgment, advertising department's judgment, surveys of advertisers, comments of advertisers, postal requirements or some other factor, which they were asked to give.

5. Finally, the questionnaire asked who processed the TMC editorial matter: the newsroom, the advertising department, or some other unit.

Respondents could leave their names and addresses at the bottom of the questionnaire and receive a tabulation of results.

Samples of their TMC products also were requested.

A sample of 337 newspapers was drawn from Editor & Publisher Yearbook. Every nth newspaper was selected to bring the sample size to 20 percent of the 1,676 U.S. newspapers. After the overall sample was obtained, it was stratified by newspaper circulation to insure representation of newspapers of all sizes. This was accomplished by again selecting every nth newspaper to fill out each stratum. The strata in the sample were in proportion to the number of newspapers in each category. They were:

Circulation	Questionnaires mailed	Questionnaires returned
Under 10,000	130 (39%)	45 (32%)
10,000 - 24,999	102 (30)	47 (34)
25,000 - 49,999	53 (16)	24 (17)
50,000 - 100,000	28 (8)	13 (9)
100,000 - 250,000	17 (5)	9 (7)
Over 250,000	7 (2)	2 (1)

The questionnaires were mailed the first week of February 1987, and most were returned in the following two weeks. A total of 140 were returned, or 42 percent of the total. Within each stratum the number of questionnaires approximated actual proportions. The largest deviation was in the largest category. Response totals were deemed satisfactory considering the exploratory nature of the study.

RESULTS

The data show that 77 percent of American newspapers have a TMC publication in existence and 8 percent tried one but stopped. Six percent were considering one at the time of the survey. Only 8 percent have never tried having TMC.

TMC's are used by newspapers large and small. Table 3 shows that in every circulation category, a majority of the papers have them. Overall, the proportion is greater in the smaller-circulation papers; more than 80 percent of those under 25,000 circulation have TMC. In the larger categories the percentages reflect small frequencies, but together, those greater than 25,000 circulation have an average of 64 percent.

The idea of a TMC publication is not as new as previously thought; 25 papers reported having had one more than 10 years. One had had a TMC publication 27 years!

The TMC products carried a newshole of 28.39 percent, considerably lower than the 48.12 percent newshole estimated for

the regular newspaper. This ranged from a low of zero for the 14 TMC products that carried no editorial matter, to 60 percent for five and a high of 70 percent for one. The average newshole was 28.39 percent.

Size of the newshole differed significantly according to circulation size. Papers were dichotomized into categories over and under 25,000, and whether TMC newshole was at the mean and below or above the mean. The four-by-four cross-tabulation is shown as Table 4. Papers in the larger circulation category tended more than the smaller papers to have a higher than average TMC newshole.

Editorial content of the TMC products ranged from wire news to recipes. Local news already run in the regular paper was by far the largest category, with 49 percent. Next was syndicated material at 18 percent, wire at 14 percent, new local material at 12 percent, free-lance material at 4 percent and "other" at 3 percent. Among the other items were such things as readers' recipes, television listing guides and cartoons.

Overwhelmingly, the TMC publications were closely associated with the parent newspaper. A total of 93 percent said their TMC products were "readily identifiable in the community" as publications of the newspaper. Eighty-one percent said the TMC product was promoted as a publication of the newspaper. For their TMC publications, 85 percent of the newspapers used the same body type, and 73 percent the same headline face. Clearly, the TMC publications have been established as offshoots of the regular newspaper.

These data answered one of the questions of the study: How closely related the TMC publications were to the parent newspaper. It had been assumed that since they were primarily advertising vehicles, newspapers would treat them differently. That was clearly not the case -- at least in terms of their overall identity.

Another expectation was that newspapers with closely identified TMC publications would turn content planning, selecting and processing over to the newsroom -- to safeguard editorial integrity.

For a large majority of these respondents, this was the case. A total of 72 percent left decisions on editorial content up to the newsroom. For 15 percent, however, editorial content was decided by the advertising department, and for 2 percent the decision was a joint one. For the remaining 11 percent, the decision was up to others in the newspaper: for one, the managing editor, two the general manager, one the special sections department in the newsroom, two a TMC editor, and at one the publisher.

Statistically significant differences in this regard were found in relation to circulation size. Larger papers were more likely to leave editorial decision-making up to the advertising department than were smaller papers (Table 5).

Processing of the TMC's editorial content was left primarily to the newsroom, since the chief material, recycled news, had originated there. The newsroom was the processor of TMC editorial material in 77 percent of the newspapers. For 13 percent the advertising department had that chore, and for the remaining 10 percent, it was left entirely up to the composing room.

Some erosion in the newsroom's independence can be noted from the data in Table 6, which summarizes the frequencies in the comparison of content decisions and content processing. In two cases the newsroom had to process TMC editorial material selected by the advertising department. In two other cases, the newsroom processed it but someone from neither advertising nor editorial selected it. The chi-square statistic could not be computed because of small frequencies, but the overwhelming pattern was for the newsroom to choose and process the TMC editorial content.

On what basis is TMC editorial content selected? How is the editorial philosophy determined? Average ratings of nine possibilities were obtained. The "newsroom's judgment" was rated highest, at 3.64. Next was "publisher's judgment" at 3.26, then "advertising department's judgment" at 2.76. Rated fourth highest, at 2.23, were "comments of advertisers," then "subscribers' comments" at 2.09. Following, in descending order, were "survey of advertisers" at 1.87, "survey of non-subscribers" at 1.71, "post office requirements" at 1.42, "other" at 1.40, and "subscriber survey" at 1.24.

Cross-tabulations of the ratings and whether editorial content was decided by the advertising or editorial department showed a significant difference in only one factor (Table 7). As might be expected, TMC publications whose content was chosen by the editorial departments were more likely to use "newsroom judgment" as a factor in determining editorial philosophy than were those whose content was decided by the advertising department. When "newsroom judgment" was rated above the mean as a factor, editorial decision-makers were in the category 92 percent of the time. In contrast, only 8 percent of the advertising decision-makers rated the factor above the mean.

DISCUSSION

Newspapers no longer deliver all the readers in a community for advertisers, but they don't let that stop them. As an alternate, they start ancillary "publications" intended as

advertising delivery vehicles. They don't hide the fact, but flaunt it. They consider the TMC publication as part of the newspaper's mission and readily promote it as a newspaper's product.

This survey showed fewer TMC publications than expected on the basis of earlier surveys. It can't be established, however, whether that is because of sampling error or whether the idea is dwindling. Some 8 percent of these respondents had not tried TMCs, but another 8 percent had tried but stopped. At the same time, 6 percent were considering them. The conclusion appears to be that interest is holding steady.

The editorial question for TMC products seems to have been easily solved at 15 percent of these newspapers, which have given content decisions to the advertising department. This study did not determine, however, how these newspapers seek to differentiate their TMC products from the regular newspaper. If they are closely identified with the paper, will non-subscribers think the content has the editorial integrity of the regular paper? Could this affect their decisions whether to subscribe? Whether to read? Will it erode the public's perceptions of regular editorial matter?

At the opposite end of such questions seem to be those papers who have given the "editing" of the TMC publications over to the composing room. Ten percent of these respondents let the backshop choose which editorial matter to run. Presumably, this consists of recycled news from the regular paper. But there were few cases where TMC publications contained solely recycled news. How composing filled the rest of the holes is a question begging an answer.

One of the ironies of TMC publications is that editors are selecting content for non-subscribers (and perhaps non-readers) of the newspaper. If they can't attract subscribers, on what basis do they select content to attract non-subscribers? On the other hand, TMC publications are not editorial products, and many editors may not want to get involved in advertising delivery vehicles. This may explain why some papers put TMC publications in departments outside both advertising and editorial realms.

Most of the papers left the processing of the TMC editorial matter to the newsroom. While some had set up TMC editors, most probably had turned the chore over to a copy editor. It is not known how managing editors deal with such extra-newsroom activities in budgets and manpower reports.

Although the newspapers appear to care a great deal about having a TMC publication to deliver the advertising, little thought is evident about the philosophy of the editorial content. Editors are left to choose material for non-readers. Newsroom

judgment was the highest rated factor in determining what to run. Editors who don't want the job may find it going to advertising or even the backshop!

Surveys to determine what non-subscribers (non-readers?) want from the TMC publications were rarely conducted. Formal methods of audience measurement -- surveys of subscribers, non-subscribers or advertisers -- were the lowest-rated items as factors in setting TMC editorial policy. It is not clear from this survey what the goal of the TMC editorial matter was, other than to satisfy postal requirements.

The editorial integrity of American newspapers appears to be in less danger from TMC publications than had been anticipated at the outset of this study. Further research is called for, however, especially about the 15 percent of the newspapers letting the advertising department select content and also about the 10 percent turning part of the job over to the composing room. Readership studies of TMC "readers" seem to be a good next step, perhaps with some case studies of procedures at individual newspapers.

Additional research is needed, too, on what the TMC does for the newspaper. If the TMC editorial content is considered as pure fodder to meet postal mandates, what is the view of editorial content in the regular newspaper? Has the erosion in newspaper penetration clouded advertisers' perceptions of newspapers as a marketing vehicle? Such question are near the surface where advertising and editorial objectives meet.

TABLE 1:

Insert Revenue and Circulation since 1970

Year	Total Newspaper Revenue (billions)		Insert Revenue* (billions)	Total Insert Circulation* (billions)
1970	$5.7			7.1
1971	6.2			10.0
1972	6.9			11.8
1973	7.5			12.8
1974	7.8			16.0
1975	8.2			15.8
1976	9.6			18.0
1977	10.8	Total		20.3
1978	12.2	Revenue		**
1979	13.9	Increase		27.2
1980	14.8	+0.9	$2.0	27.7
1981	16.5	+1.7	2.3	28.7
1982	17.7	+1.2	2.5	30.0
1983	20.6	+2.9	3.7	41.3
1985	25.5	+2.0	4.2	45.4

*Based on a 12-page tabloid. Includes printing and inserting; 55% and 45%, respectively (50/50 before 1982)

**Data not available

Source: Newspaper Advertising Bureau

Table 2:

Daily Newspaper Number and Circulation, U.S. Population since 1970

Year	Number Newspapers	Daily Circulation (millions)	U.S. Population (millions)
1970	1,748	62.1	205.1
1975	1,756	60.7	216.0
1980	1,775	62.2	227.7
1981	1,760	61.4	230.0
1982	1,744	62.5	232.3
1983	1,730	62.1	234.5
1984	1,715	63.3	236.6
1985	1,676	62.8	283.8

Source: Editor & Publisher Yearbook, U.S. Statistical Abstract.

TABLE 3:

TMC Use by Circulation Size

Circulation Category	Percent with TMC	N
Under 10,000	82%	44
10,000 - 24,999	87	47
25,000 - 49,999	58	24
50,000 - 99,999	62	13
100,000 - 249,999	78	7
150,000 +	100	1

Table 4:

Circulation Size and Above Average Newshole Size

	TMC Newshole Mean or Below (Mean = 28.39%) (column percentages)	Above Mean	N
Circulation Size			
Under 24,999	84%	61	72
25,000 +	16	39	30
N	43	59	

Chi-square = 6.18; d.f. = 1, $p > .02$

Table 5:

Editorial Content Decision and Circulation Size

Circulation Size	Who decides TMC content? Ad. Dept. (column percentages)	Ed. Dept.	N
Under 25,000	43%	72	(54)
25,000 +	57	28	(27)
N	(14)	(67)	

Chi-square = 4.32; d.f. = 1, p > .04

Table 6:

Editorial Content Decisions and Content Processing

Who Decides Content?	Who Processes? Newsroom	Ad. Dept.	Composing
Ad. Dept.	2	11	0
Ed. Dept.	62	0	2
Other	2	0	7

Table 7:

Content Decisions and Newsroom Judgment

	Ratings of "Newsroom Judgment" in TMC editorial philosophy (Average = 3.64) (column percentages)		
	Average & below	Above Average	
Who decides content?			N
Ed. Dept.	54	92	59
Ad. Dept.	46	8	16
N	26	49	

Chi-square = 14.61; d.f. = 1, p. < .0001

APPENDIX A:

SURVEY QUESTIONNAIRE

School of Journalism
LOUISIANA STATE UNIVERSITY AND AGRICULTURAL AND MECHANICAL COLLEGE
BATON ROUGE · LOUISIANA · 70803-7202
(504) 388-2336

Dear Editor,

Total-market-coverage publications have become a force in the newspaper industry, yet little information about them is available. Results of this national survey will be confidential. A return envelope for the questionnaire is provided.

Please take a minute to contribute to this study.

1. Paper's TMC experience (circle letter of answer)
   A. Have not tried. B. Tried for _____but stopped.
   C. Considering one. D. Have had one since _____.
   E. Other_____.

The following questions are only for papers having TMC's now.

2. Day TMC offered (indicate multiple days if needed)
   A. Sunday B. Monday C. Tuesday D. Wednesday
   E. Thursday F. Friday G. Saturday H. Other than weekly

3. How delivered
   A. Paper's carriers B. Separate carrier force
   C. 2nd-class mail D. 3rd-class mail E. Other_____

4. Delivered to
   A. Subscriber B. Non-subscriber C. Both
   D. Census tract zones E. Targeted credit card customers
   F. Other_____

5. Kind of advertising content (estimated percentage)
   _____% A. New classified ads
   _____ B. Classified ads already run in paper
   _____ C. Coupons
   _____ D. Preprints
   _____ E. Zoned retail ads
   _____ F. National, excluding coupons

6. Name of your TMC product_____

7. Typical size in pages_____

8. If zoned, to how many zones in all?_____

9. How are ads in the TMC also delivered in the regular paper?
   A. ROP B. As inserts only C. Zoned
   D. Combination (which)_____ E. Other_____

10. Does paper deliver same TMC product to regular subscribers?
    Yes_____ No_____

11. TMC product format.
A. Tab B. Broadsheet C. Other_____

12. TMC product use same body type as paper? Yes_____ No_____

13. TMC product use same headline faces as paper? Yes_____ No____

14. Is TMC product readily identifiable in the community as a publication of your newspaper? Yes_____ No_____

15. Is TMC product promoted as a publication of your newspaper or as a separate publication? As paper's_____ Separate_____

16. How much newshole does the TMC product typically have, in estimated percentages? 0 10 20 30 40 50 60 70 80 90

17. How much newshole does the regular newspaper typically have, in estimated percentages? 10 20 30 40 50 60 70 80 90

18. Who decides the kind of editorial content of TMC product?
A. Ad dept. B. Editorial dept. C. Other_____

19. Kind of editorial content (estimated percentage)
_____% A. Local newspaper material already run
_____ B. New, locally produced materials
_____ C. Wire services
_____ D. Syndicates
_____ E. Free-lancers
_____ F. Other_____

20. How is TMC editorial philosophy determined? (Rate on a scale of zero to 5 how important the factors below are in the decision.)

0 1 2 3 4 5 A. Surveys of subscribers
0 1 2 3 4 5 B. Surveys of non-subscribers
0 1 2 3 4 5 C. Comments from subscribers
0 1 2 3 4 5 D. Publisher's judgment
0 1 2 3 4 5 E. Newsroom's judgment
0 1 2 3 4 5 F. Ad department's judgment
0 1 2 3 4 5 G. Surveys of advertisers
0 1 2 3 4 5 H. Comments of advertisers
0 1 2 3 4 5 I. Post office requirements
0 1 2 3 4 5 J. Other_____

21. Who processes TMC editorial material?
A. Newsroom B. Ad dept. C. Other_____

Thanks for your time. A copy of survey results will be provided if you wish. Leave address below. Samples of your TMC product would be appreciated.

NOTES

1. Sobezynski, Anna. "Retailers' preprints saturating the land," Advertising Age, 55 (June 14, 1984), pp. 34-38.

2. Rambo, C. David. "K mart is your preprint place." Presstime, 7 (February 1985), pp. 12-14.

3. "Newspapers Still Utilize Youth Carriers." ICMA Update, 80 (July 1984), pp. 7-9. Also see "Who says people don't read a daily newspaper," Editor & Publisher (August 9, 1986) pp. 17-18, in which Leo Bogart, executive vice president of the Newspaper Advertising Bureau, says a survey of 318 publishers found 85 percent of all daily newspapers now offer some kind of TMC product.

4. "Alternative Distribution Seminar To Be Held: Survey is Completed." ICMA Update, 79 (March 1985), p. 42.

5. See the two publications (cited above) from the International Circulation Managers Association. Another survey was conducted in March of 1983 by the International Newspaper Advertising and Marketing Executives.